

## Assessment Contacts

1. To create an Assessment Contact from the desktop, go up to Create > Casework. From the assessment icon, select Assessment Contact, the case. If the contact is with a participant of the case, you can pick the appropriate name from the participant box. If the contact is with someone who is not a participant with the case, don't select a name. Select Create.
2. The Assessment Contact appears in the same format as Case Notes with a few subtle changes. The top of the page pre-fills with the Case Name, Worker, and Date and Time entered.
3. In the Note Information Box, the date and time are required user entered fields. The Category and Type will automatically pre-fill with Assessment Contact.
4. The Face to Face Contact Type and Face to Face Contact Result are drop down value fields. Select a value that best describes the Assessment Contact Type.
5. The Units and Billable box are not used for the Assessment Contacts.
6. The Participants in the case are shown on the right side. You can use control to multi select additional participants.
7. The Narrative box is a user-entered field. Enter a narrative describing what happened during contact with the individual.
8. Notice the scroll bar to the right. The page is too big to display the entire contents. Use the scroll bar to view the bottom of the page.

9. Below the Narrative Box is an expando with Assessment Contact Information. Click on the expando to view the user required fields.

The Begin Date Box is a drop down value with the date current date displaying. Click on the drop down value field to view other dates. Select the correct date on which the contact took place.

The Name, Affiliation, Title and Contact Date are user entered mandatory fields. If a mistake was made, use the Delete Hyperlink to remove the information entered.

The Insert button will allow additional Assessment Contact Information to be entered.

10. Finally, when completed, click on Save and Close. This information will be saved under the Assessment Icon and will pre-fill the Initial Assessment with the contacts names and dates.

Case Notes - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

**eWiSACWIS** Print Spell Check Help

**Narrative**

Case Note 1/1

Enter Narrative here.

**Assessment Contact Information**

**Assessment Contact Information**

Begin Date: 05/14/2004 08:08 AM

Name	Affiliation	Title	Contact Date	AM	PM	Delete
Ash, April			00/00/0000	00:00	<input checked="" type="radio"/> AM <input type="radio"/> PM	<a href="#">Delete</a>
			00/00/0000	00:00	<input checked="" type="radio"/> AM <input type="radio"/> PM	<a href="#">Delete</a>
			00/00/0000	00:00	<input checked="" type="radio"/> AM <input type="radio"/> PM	<a href="#">Delete</a>

[Insert](#)

[Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

Done Local intranet